

Eaton Vance Corp. Fundamental Company Report Including Financial, SWOT, Competitors and Industry Analysis

<https://marketpublishers.com/r/E197925141BBEN.html>

Date: May 2025

Pages: 50

Price: US\$ 499.00 (Single User License)

ID: E197925141BBEN

Abstracts

Eaton Vance Corp. Fundamental Company Report provides a complete overview of the company's affairs. All available data is presented in a comprehensive and easily accessed format. The report includes financial and SWOT information, industry analysis, opinions, estimates, plus annual and quarterly forecasts made by stock market experts. The report also enables direct comparison to be made between Eaton Vance Corp. and its competitors. This provides our Clients with a clear understanding of Eaton Vance Corp. position in the Industry.

The report contains detailed information about Eaton Vance Corp. that gives an unrivalled in-depth knowledge about internal business-environment of the company: data about the owners, senior executives, locations, subsidiaries, markets, products, and company history.

Another part of the report is a SWOT-analysis carried out for Eaton Vance Corp.. It involves specifying the objective of the company's business and identifies the different factors that are favorable and unfavorable to achieving that objective. SWOT-analysis helps to understand company's strengths, weaknesses, opportunities, and possible threats against it.

The Eaton Vance Corp. financial analysis covers the income statement and ratio trend-charts with balance sheets and cash flows presented on an annual and quarterly basis. The report outlines the main financial ratios pertaining to profitability, margin analysis, asset turnover, credit ratios, and company's long-

term solvency. This sort of company's information will assist and strengthen your company's decision-making processes.

In the part that describes Eaton Vance Corp. competitors and the industry in whole, the information about company's financial ratios is compared to those of its competitors and to the industry. The unique analysis of the market and company's competitors along with detailed information about the internal and external factors affecting the relevant industry will help to manage your business environment. Your company's business and sales activities will be boosted by gaining an insight into your competitors' businesses.

Also the report provides relevant news, an analysis of PR-activity, and stock price movements. The latter are correlated with pertinent news and press releases, and annual and quarterly forecasts are given by a variety of experts and market research firms. Such information creates your awareness about principal trends of Eaton Vance Corp. business.

About Eaton Vance Corp.

Eaton Vance Corp. provides investment advisory and distribution services to mutual funds and other investment funds, and investment management and counseling services to individual investors, family offices and institutional clients.

The company's products and services include company-sponsored open-end and closed-end funds, private funds for institutional investors, retail managed accounts and separately managed accounts for institutional and investors. The company distributes a range of products and services, including funds, retail managed accounts, institutional separate accounts and separate accounts in multiple distribution channels. It operates in one business segment, namely as an investment adviser managing fund and separate account assets.

The company conducts its investment management business through its three wholly owned subsidiaries, Eaton Vance Management (EVM), Boston Management and Research (BMR), and Eaton Vance Investment Counsel (EVIC), and its three majority owned subsidiaries, Atlanta Capital, Fox Asset Management and Parametric Portfolio Associates. Eaton Vance Distributors, Inc. (EVD) markets and sells the Eaton Vance funds and retail managed accounts. Eaton Vance Management (International) Limited, (EVMI), a wholly owned financial services company, markets and sells the company's

investment products in Europe and certain other international markets.

Sponsored Investment Products

The company provides investment advisory services to funds, separate accounts, institutional separate accounts and retail managed accounts across a range of equity and fixed and floating-rate asset classes.

Open-end Funds: The company, as of October 31, 2006, offered 106 open-end funds, including 12 tax-managed equity funds, 41 state and national municipals funds, 9 bank loan funds (including 6 continuously offered interval funds), 29 non-tax-managed equity funds, 10 taxable fixed income funds and 5 money market funds. In addition to its tax-managed equity funds, the company offers a family of municipal bond funds that are part of the company's tax-advantaged fund lineup. As of October 31, 2006, its open-end municipal bond funds included four national and 37 state-specific municipal bond funds in 29 different states.

The company also offers various floating-rate bank loan funds, taxable fixed-income funds and equity funds for retirement plan assets and other tax-insensitive investors. Its non-tax-managed equity fund offerings include large, mid and small-cap funds in value, core and growth styles, dividend income funds, international and global funds, and sector-specific funds. The company's taxable income fund offerings utilize its investment management capabilities in a range of fixed income asset classes, including mortgage-backed securities, global currency and income investments, high grade bonds and high yield bonds.

Private Funds

The company's private fund category includes privately offered equity funds designed to meet the diversification and tax-management needs of investors and floating-rate bank loan funds, including collateralized debt obligation (CDO) entities, offered to institutional investors.

Closed-end Funds

Eaton Vance has 35 closed-end funds, including three bank loan funds, three diversified income funds, eight equity income funds and 21 municipal income funds. In May 2006, the Company offered Eaton Vance Credit Opportunities Fund, a new closed-end fund, which invests in a range of fixed and floating-rate income instruments.

Retail Managed Accounts

The company, as of October 31, 2005, participated in approximately 40 retail managed account broker/dealer programs.

Institutional Separate Accounts

The company serves various clients in the institutional marketplace, including, foundations, endowments and retirement plans for individuals, corporations and municipalities. In 2005, the company expanded its institutional product offerings to include a liability-based solutions strategy, providing investment management portfolios to institutional clients seeking to hedge and outperform their future liabilities.

High-Net-Worth Separate Accounts

The company and its affiliates offer high-net-worth clients and family offices personalized investment counseling services.

Investment Management and Administrative Activities

The company's wholly owned subsidiaries, EVM and BMR, are investment advisers for all but five of the Eaton Vance funds. Lloyd George Management (LGM), an independent investment management company based in Hong Kong in which the company owns a 20 percent equity position, is the investment adviser for four international equity funds. OrbiMed Advisors LLC (OrbiMed), an independent investment management company, is the investment adviser for Eaton Vance Worldwide Health Sciences Fund and Eaton Vance VT Worldwide Health Sciences Fund.

Eagle Global Advisors, L.L.C. (Eagle) acts as a sub-adviser to Eaton Vance Tax-Managed International Equity Fund, Eaton Vance International Equity Fund, and Eaton Vance Global Growth Fund. Rampart Investment Management acts as a sub-adviser for options program management for Eaton Vance Enhanced Equity Income Fund, Eaton Vance Enhanced Equity Income Fund II, Eaton Vance Tax-Managed Buy-Write Income Fund, Eaton Vance Tax-Managed Buy-Write Opportunities Fund, and Eaton Vance Tax-Managed Global Buy-Write Opportunities Fund. Atlanta Capital, Fox Asset Management and Parametric Portfolio Associates also act as sub-advisers to EVM and BMR for 10 funds.

Acquisitions

The company, in 2006, acquired the management contracts of Voyager Asset Management (MA), Inc.

History

Eaton Vance Corp. was founded in 1944.

The above Company Fundamental Report is a half-ready report and contents are subject to change.

It means that we have all necessary data in our database to prepare the report but need **2-3 days** to complete it. During this time we are also updating the report with respect to the current moment. So, you can get all the most recent data available for the same price. Please note that preparation of additional types of analyses requires extra time.

Contents

RESEARCH METHODOLOGY

DISCLAIMER

1. EATON VANCE CORP. COMPANY PROFILE

- 1.1. Key facts
- 1.2. Financial Performance
- 1.3. Key Executives
- 1.4. Ownership and Major Holders
- 1.5. Company History

2. EATON VANCE CORP. BUSINESS OVERVIEW

- 2.1. Business Description
- 2.2. Major Products and Services
- 2.3. Markets and Sales Activities
- 2.4. Locations, Subsidiaries, Operating Units

3. EATON VANCE CORP. SWOT ANALYSIS

- 3.1. Overview
- 3.2. Strengths
- 3.3. Weaknesses
- 3.4. Opportunities
- 3.5. Threats

4. EATON VANCE CORP. FINANCIAL ANALYSIS

- 4.1. Financial Statements
 - 4.1.1. Income Statement
 - 4.1.2. Balance Sheet
 - 4.1.3. Cash Flow
- 4.2. Financial Ratios
 - 4.2.1. Profitability
 - 4.2.2. Margin Analysis

- 4.2.3. Asset Turnover
- 4.2.4. Credit Ratios
- 4.2.5. Long-Term Solvency
- 4.2.6. Growth Over Prior Year
- 4.2.7. Financial Ratios Charts
- 4.3. Stock Market Snapshot

5. EATON VANCE CORP. COMPETITORS AND INDUSTRY ANALYSIS

- 5.1. Eaton Vance Corp. Direct Competitors
- 5.2. Comparison of Eaton Vance Corp. and Direct Competitors Financial Ratios
- 5.3. Comparison of Eaton Vance Corp. and Direct Competitors Stock Charts
- 5.4. Eaton Vance Corp. Industry Analysis
 - 5.4.1. Industry Snapshot
 - 5.4.2. Eaton Vance Corp. Industry Position Analysis

6. EATON VANCE CORP. NEWS & EVENTS

- 6.1. News & PR Activity Analysis
- 6.2. IR Corporate News
- 6.3. Marketing News
- 6.4. Corporate Events

7. EATON VANCE CORP. EXPERTS REVIEW¹

- 7.1. Experts Consensus
- 7.2. Experts Revisions

8. EATON VANCE CORP. ENHANCED SWOT ANALYSIS²

9. UNITED STATES PESTEL ANALYSIS²

- 9.1. Political Factors
- 9.2. Economic Factors
- 9.3. Social Factors
- 9.4. Technological Factors
- 9.5. Environmental Factors
- 9.6. Legal Factors

10. EATON VANCE CORP. IFE, EFE, IE MATRICES²

- 10.1. Internal Factor Evaluation Matrix
- 10.2. External Factor Evaluation Matrix
- 10.3. Internal External Matrix

11. EATON VANCE CORP. PORTER FIVE FORCES ANALYSIS²

12. EATON VANCE CORP. VRIO ANALYSIS²

APPENDIX: RATIO DEFINITIONS

LIST OF FIGURES

Eaton Vance Corp. Annual Revenues in Comparison with Cost of Goods Sold and Gross Profit
Profit Margin Chart
Operating Margin Chart
Return on Equity (ROE) Chart
Return on Assets (ROA) Chart
Debt to Equity Chart
Current Ratio Chart
Eaton Vance Corp. 1-year Stock Charts
Eaton Vance Corp. 5-year Stock Charts
Eaton Vance Corp. vs. Main Indexes 1-year Stock Chart
Eaton Vance Corp. vs. Direct Competitors 1-year Stock Charts
Eaton Vance Corp. Article Density Chart

1 – Data availability depends on company's security policy.

2 – These sections are available only when you purchase a report with appropriate additional types of analyses.
The complete financial data is available for publicly traded companies.

List Of Tables

LIST OF TABLES

Eaton Vance Corp. Key Facts
Profitability
Management Effectiveness
Income Statement Key Figures
Balance Sheet Key Figures
Cash Flow Statement Key Figures
Financial Performance Abbreviation Guide
Eaton Vance Corp. Key Executives
Eaton Vance Corp. Major Shareholders
Eaton Vance Corp. History
Eaton Vance Corp. Products
Revenues by Segment
Revenues by Region
Eaton Vance Corp. Offices and Representations
Eaton Vance Corp. SWOT Analysis
Yearly Income Statement Including Trends
Income Statement Latest 4 Quarters Including Trends
Yearly Balance Sheet Including Trends
Balance Sheet Latest 4 Quarters Including Trends
Yearly Cash Flow Including Trends
Cash Flow Latest 4 Quarters Including Trends
Eaton Vance Corp. Profitability Ratios
Margin Analysis Ratios
Asset Turnover Ratios
Credit Ratios
Long-Term Solvency Ratios
Financial Ratios Growth Over Prior Year
Eaton Vance Corp. Capital Market Snapshot
Eaton Vance Corp. Direct Competitors Key Facts
Direct Competitors Profitability Ratios
Direct Competitors Margin Analysis Ratios
Direct Competitors Asset Turnover Ratios
Direct Competitors Credit Ratios
Direct Competitors Long-Term Solvency Ratios
Industry Statistics

Eaton Vance Corp. Industry Position
Company vs. Industry Income Statement Analysis
Company vs. Industry Balance Sheet Analysis
Company vs. Industry Cash Flow Analysis
Company vs. Industry Ratios Comparison
Eaton Vance Corp. Consensus Recommendations¹
Analyst Recommendation Summary¹
Price Target Summary¹
Experts Recommendation Trends¹
Revenue Estimates Analysis¹
Earnings Estimates Analysis¹
Historical Surprises¹
Revenue Estimates Trend¹
Earnings Estimates Trend¹
Revenue Revisions¹

ANALYSIS FEATURES

SWOT Analysis

SWOT, which stands for Strengths, Weaknesses, Opportunities and Threats, is an analytical framework that identifies the internal and external factors that are favorable and unfavorable for a company.

Enhanced SWOT Analysis

Enhanced SWOT is a 3x3 grid that arranges strengths, weaknesses, opportunities and threats into one scheme:

How to use the strengths to take advantage of the opportunities?

How to use the strengths to reduce likelihood and impact of the threats?

How to overcome the weaknesses that obstruct taking advantage of the opportunities?

How to overcome the weaknesses that can make the threats a reality?

Upon answering these questions a company can develop a project plan to improve its business performance.

PESTEL Analysis

PESTEL (also termed as PESTLE) is an ideal tool to strategically analyze what influence different outside factors – political, economic, sociocultural, technological, environmental and legal – exert on a business to later chart its long term targets.

Being part of the external analysis when carrying out a strategic assessment or performing a market study, PESTEL gives an overview of diverse macro-environmental factors that any company should thoughtfully consider. By perceiving these outside environments, businesses can maximally benefit from the opportunities while minimizing the threats to the organization.

Key Factors Examined by PESTEL Analysis:

Political – What opportunities and pressures are brought by political bodies and what is the degree of public regulations' impact on the business?

Economic – What economic policies, trends and structures are expected to affect the organization, what is this influence's degree?

Sociological – What cultural and societal aspects will work upon the demand for the business's products and operations?

Technological – What impact do the technological aspects, innovations, incentives and barriers have on the organization?

Environmental – What environmental and ecological facets, both locally and farther afield, are likely to predetermine the business?

Legal – What laws and legislation will exert influence on the style the business is carried out?

IFE, EFE, IE Matrices

The Internal Factor Evaluation matrix (IFE matrix) is a strategic management tool helping audit or evaluate major weaknesses and strengths in a business's functional areas. In addition, IFE matrix serves as a basis for identifying and assessing relationships amongst those areas. The IFE matrix is utilised in strategy formulation.

The External Factor Evaluation matrix (EFE matrix) is a tool of strategic management that is typically utilised to assess current market conditions. It is an ideal instrument for visualising and prioritising the threats and opportunities a firm is facing.

The essential difference between the above mentioned matrices lies in the type of factors incorporated in the model; whilst the latter is engaged in internal factors, the former deals exceptionally with external factors – those exposed to social, political, economic, legal, etc. external forces.

Being a continuation of the EFE matrix and IFE matrix models, the Internal External matrix (IE matrix) rests upon an investigation of external and internal business factors

integrated into one suggestive model.

Porter Five Forces Analysis

The Porter's five forces analysis studies the industry of operation and helps the company find new sources of competitive advantage. The analysis surveys an industry through five major questions:

What composes a threat of substitute products and services?

Is there a threat of new competitors entering the market?

What is the intensity of competitive rivalry?

How big is the bargaining power of buyers?

How significant is the bargaining power of suppliers?

VRIO Analysis

VRIO stands for Value, Rarity, Imitability, Organization. This analysis helps to evaluate all company's resources and capabilities and bring them together into one aggregate table that includes:

Tangible resources

Financial

Physical

Technological

Organizational

Intangible resources

Human

Innovation and Creativity

Reputation

Organizational capabilities

The result of the analysis gives a clear picture of company's competitive and economic implications, answering the questions if the resources mentioned above are:

Valuable?

Rare?

Costly to imitate?

Organized properly?

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